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Choose Your Own Research Adventure: Developing a Technical Services-Based Research Project.

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Utah State University

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University of Utah

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CHOOSE YOUR OWN RESEARCH ADVENTURE: DEVELOPING A TECHNICAL SERVICES BASED RESEARCH PROJECT

Utah Library Association

Annual Conference

May 18, 2017

Liz Woolcott

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Jeremy Myntti

Head of Digital Library Services

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ONCE UPON A TIME....



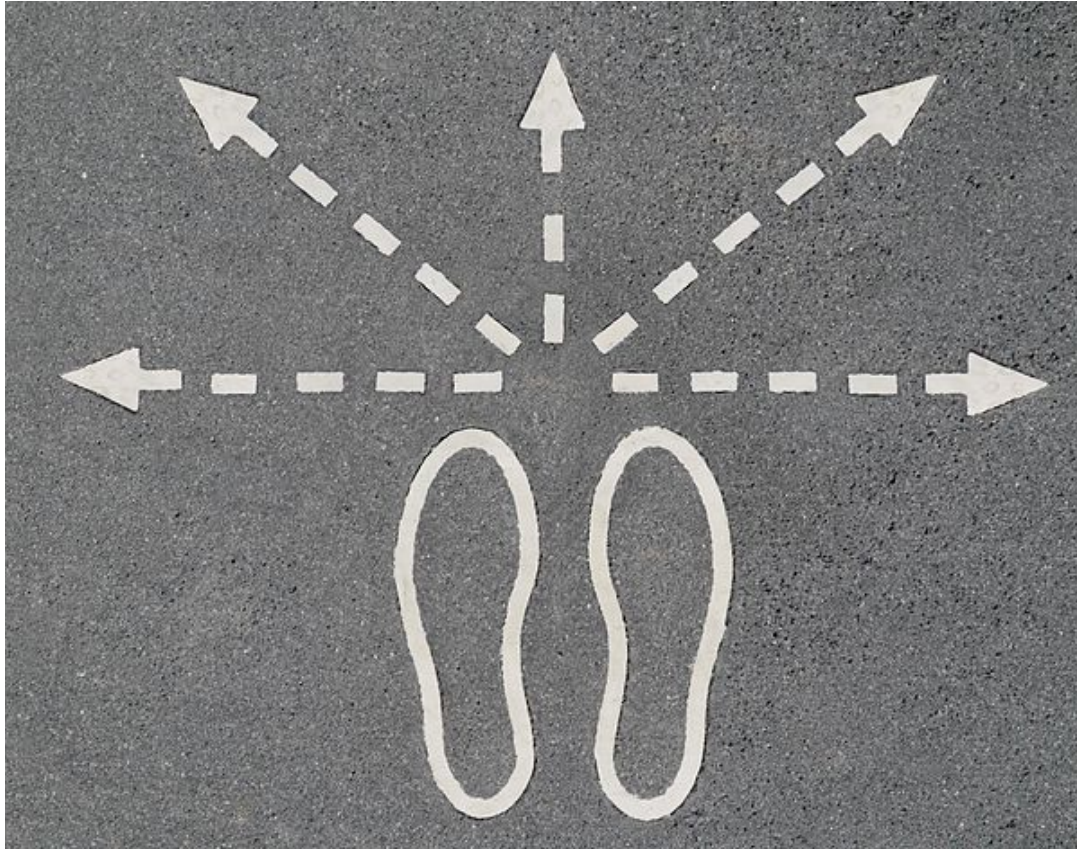
I wonder
what other
libraries
do...

How to Create a Research
Project

What Did We Find?

HOW TO CREATE A RESEARCH PROJECT

WHERE SHOULD WE START?



- Identify a question
- Develop survey
- Analyze data
- Share results
- Lessons learned

IDENTIFY QUESTION

IDENTIFY

1. Research study should:
 - a. Ask a question
 - b. Have a target population
 - c. Measure something or test a hypothesis
 - d. Be beneficial or have an impact



IDENTIFY

#catalogingunits

1. For example, the cataloging survey:
 - a. Ask a question**
 - i. What are the structures of current cataloging units and how has that changed in the last 10 years?
 - b. Have a target population**
 - i. Academic library cataloging unit employees
 - c. Measure something or test a hypothesis**
 - i. Measured current and past structures, staffing, work responsibilities, faculty status, library size, organizational structure, etc.
 - d. Be beneficial or have an impact**
 - i. Outlined the landscape of cataloging units in academic libraries and demonstrated change over time

IDENTIFY



1. How do I start developing a research question?
 - a. Talk to colleagues
 - b. Read the current literature
 - c. Examine frustrations or questions arising from your own work
 - d. Look at the larger professional patterns

WHERE NEXT?



- Identify a question
- Develop survey
- Analyze data
- Share results
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What Did You Find?

DEVELOP SURVEY

THE SURVEY

When : March and April 2016

Who : Academic library employees with knowledge of the structure/organization of cataloging unit

Where : No geographic boundary set intentionally (although questions were US-centric)

What : Questions asked about the following

- Institution: type and size
- Library size: staff, budget, collection
- Cataloging staff, hierarchy, faculty status
- Cataloging tasks, outsourced tasks
- Future plans for restructuring, task allocation, skills development



SURVEY

UtahState University

Academic Institution Demographics

Please tell us about your institution.

In what kind of academic institution do you work?

What is the full-time equivalent (FTE) student population for your institution?

Library Demographics

Please tell us about your library

Is your library part of a multi-part library system?

(For the purposes of this survey, a multi-part library system is defined as "Multiple, distinct libraries who share an ILS, OPAC, and/or Discovery Layer along with shared responsibilities for cataloging and catalog maintenance.")

UtahState University

Academic Institution Demographics

Please tell us about your institution.

In what kind of academic institution do you work?

What is the full-time equivalent (FTE) student population for your institution?

Library Demographics

- Develop questions and definitions for terms
- Create logical order
- Test for functionality

QUALTRICS

- Why did we use Qualtrics?
 - Robust survey software
 - Skip logic
 - If/then
 - Variety of question types
 - Multiple choice
 - Write-in
 - Sliders
 - Matrices
 - Drag and drop
 - Ranking
 - Heat Maps/Hot Spots
 - Statistical Analysis
 - Visualizations
 - Cross tabulations
 - Distribution control
 - Data export

Cataloging Tasks

This section of the survey will look at tasks that are assigned to the cataloging unit in your library.

Who is responsible for the following cataloging and metadata tasks? **Select all that apply.**

[illegible]

ADDITIONAL OPTIONS

- What other survey options are there?
 - Survey Monkey
 - Google Forms
 - Typeform
 - Zoho Survey
 - Survey Gizmo
 - Survey Plant
- What non-survey methods can I use?
 - Focus Groups
 - Interviews
 - Case studies
 - Content Analysis
 - Experiments
 - Meta-analysis
 - Observational Study



IRB APPROVAL



INSTITUTIONAL REVIEW BOARD

THE UNIVERSITY OF UTAH

75 South 2000 East Salt Lake City, UT 84112 | 801.581.3655 | IRB@utah.edu

IRB: IRB_00089644

PI: Jeremy Myntti

Title: Organizational Structure of Cataloging Units in Academic Libraries

Date: 3/4/2016

Thank you for submitting your request for approval of the study. An IRB member has determined that your study is exempt from review under federal guidelines 45 CFR Part 46.101(b) category #2. Note the following delineation of Exemption Category 2.

- Categories 1-6: Federal Exemption Categories defined in 45 CFR Part 46.101(b)
 - Categories 7-11: Non-Federal Exemption Categories defined in 45 CFR Part 46.101(b)
- http://irb.utah.edu/_pdf/IGS - Exempt Research 09011

You must adhere to all requirements for exemption described in the IRB policy (http://irb.utah.edu/_pdf/IGS - Exempt Research 09011)

- All research involving human subjects must be approved by the IRB before the research is conducted.
- All research activities must be conducted in accordance with the principles of sound research design and ethical conduct.
- Orderly accounting and monitoring of research activities.

Continuing Submissions for Exempt Research



Institutional Review Board

USU Assurance: FWA#00003308

Exemption #2

Certificate of Exemption



FROM:

Melanie Domenech Rodriguez, IRB Chair

Nicole Vouvalis, IRB Administrator

A handwritten signature in black ink, likely belonging to Melanie Domenech Rodriguez.

A handwritten signature in blue ink, likely belonging to Nicole Vouvalis.

To: Elizabeth Woolcott

Date: March 07, 2016

Protocol #: 7326


Title: Organization And Structure Of Cataloging Units In Academic Libraries

The Institutional Review Board has determined that the above-referenced study is exempt from review under federal guidelines 45 CFR Part 46.101(b) category #2:

Research involving the use of educational tests (cognitive, diagnostic, aptitude, achievement), survey procedures,

DISTRIBUTE SURVEY

Thu 3/10/2016 2:15 PM

 Jeremy Myntti <jeremy.myntti@gmail.com>

Study on the Organization and Structure of Cataloging Units in Academic Libraries

To: Jeremy Myntti; liz.woolcott@usu.edu

*****Apologies for Cross-Posting*****

Study on the Organization and Structure of Cataloging Units in Academic Libraries

You are being invited to participate in a research project conducted by Jeremy Myntti, Interim Head of University of Utah and Liz Woolcott, Head of Cataloging and Metadata Services, Utah State University. The project will investigate the current and changing structures of Cataloging Departments/Units in academic libraries. The survey will be open until April 30, 2016. This survey is open to anyone self-identifying as an employee of an academic library with structure and organization of the cataloging unit that supports that library. The total number of participants in the project will depend on the number of people who respond to this survey. This is a virtual multi-location study. This survey will ask respondents about the past, current, and potential future of their Cataloging Departments. Participants will answer a series of questions related to the past and current structure of their cataloging department and future plans for changing the structure. The survey should take 20 minutes to complete. Respondents should only take this survey once.

<http://bit.ly/1QPURCD>

While you will not directly benefit from participation, your participation may help investigators understand organizational structures for cataloging departments. The results of this study may be published in professional journals or also be used for educational purposes or for professional presentations. However, no individual responses will be shared. Your participation in this project is anonymous. We will not be collecting any personally identifying information. If you have any questions, you may contact Liz Woolcott (liz.woolcott@usu.edu or 435-797-9458) or Jeremy Myntti (jeremy.myntti@utah.edu or 801-585-9537).

Best regards,
Liz Woolcott and Jeremy Myntti

The Institutional Review Board for the protection of human participants at Utah State University has approved this study. If you have any questions or concerns about your rights or a research-related injury and would like to contact someone other than the research team, you may contact the IRB Administrator at (435) 797-9567 or email irb@usu.edu to obtain information or to offer input.

The University of Utah's Institutional Review Board (IRB) has approved this study regarding your rights as a research participant. Also, contact the IRB if you do not feel you can discuss with the investigator. The University of Utah's IRB is located at irb@hsc.utah.edu.

 Liz Woolcott shared a link to the group: [Troublesome Catalogers and Magical Metadata Fairies](#).

March 10, 2016 · Logan, UT · 🌐

Jeremy Myntti and I are conducting a survey on the "Organization and Structure of Cataloging Units in Academic Libraries". If you have a moment, we would love your input!

Here's the URL: <http://bit.ly/1QPURCD> (<http://bit.ly/1QPURCD>)



Online Survey Software | Qualtrics Survey Solutions

Qualtrics sophisticated online survey software solutions make creating online surveys easy. Learn more about Research Suite and get a free account today.

USU.CO1.QUALTRICS.COM

👍 You, Anna Neatrou, Marcia Barrett and 3 others

3 Comments

👍 Like 💬 Comment ➦ Share

You Retweeted

 Liz Woolcott @LizWoolcott · 10 Mar 2016

Calling all catalog/metadata friends, tell @jmyntti & I abt the structure of your Academic Library Cataloging Unit: bit.ly/1QPURCD

🔄 5 ❤️ 1

WHERE NEXT?



- Identify a question
- Develop survey
- Analyze data
- Share results
- Lessons learned

What Did You Find?

ANALYZE DATA

ANALYSIS TOOLS

1. Data Cleanup and Normalization:
 - a. Excel
 - b. Google Sheets
 - c. OpenRefine
2. Data Analysis
 - a. Qualtrics
 - b. Excel
 - c. Google Sheets
 - d. OpenRefine
3. Data Visualization
 - a. Qualtrics
 - b. Excel
 - c. Google Sheets
 - d. Visme
 - e. Tableau
 - f. Wordle
 - g. Wordclouds



ANALYZE

Library Staff FTE/Outsourcing Cataloging

		What is the full-time equivalent (FTE) number of salaried employees for your library (including a...							
		1-10	11-30	31-50	51-70	71-100	101-150	150+	Total
Do you outsource any cataloging tasks?	Yes	18	27	23	16	18	21	22	145
	No	55	52	21	9	8	8	9	162
	I don't know	0	0	0	0	0	0	0	0
	Total	73	79	44	25	26	29	31	307

Multiple choice results

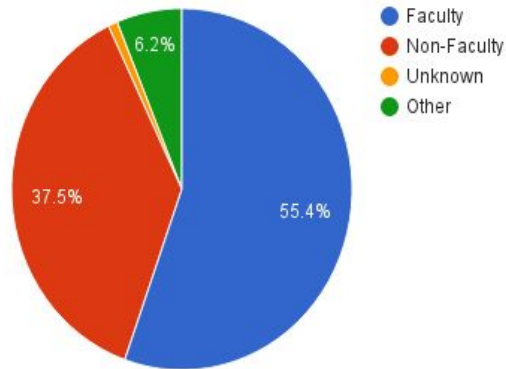


Open ended questions

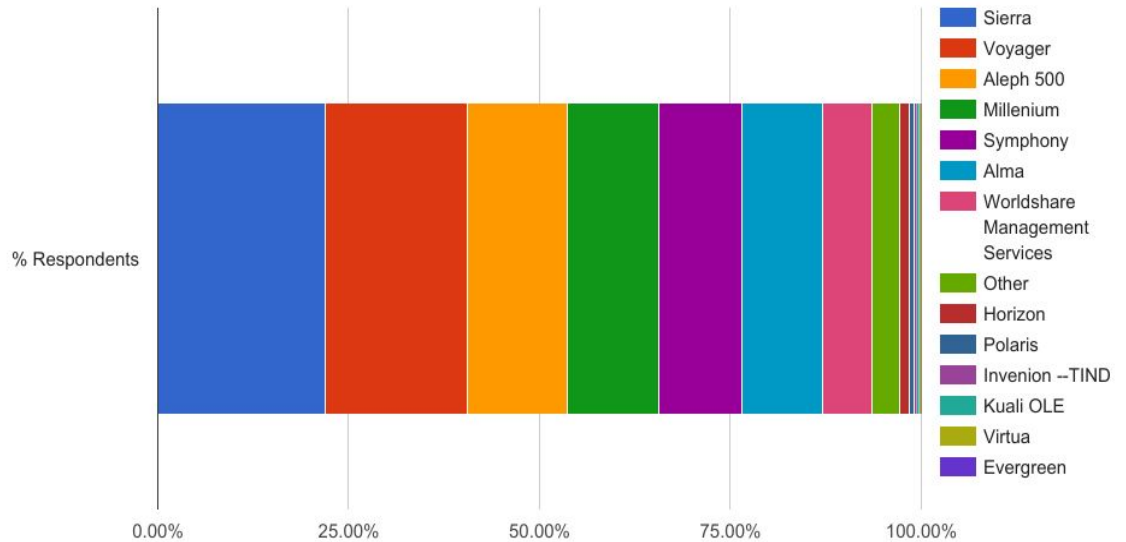


ANALYZE

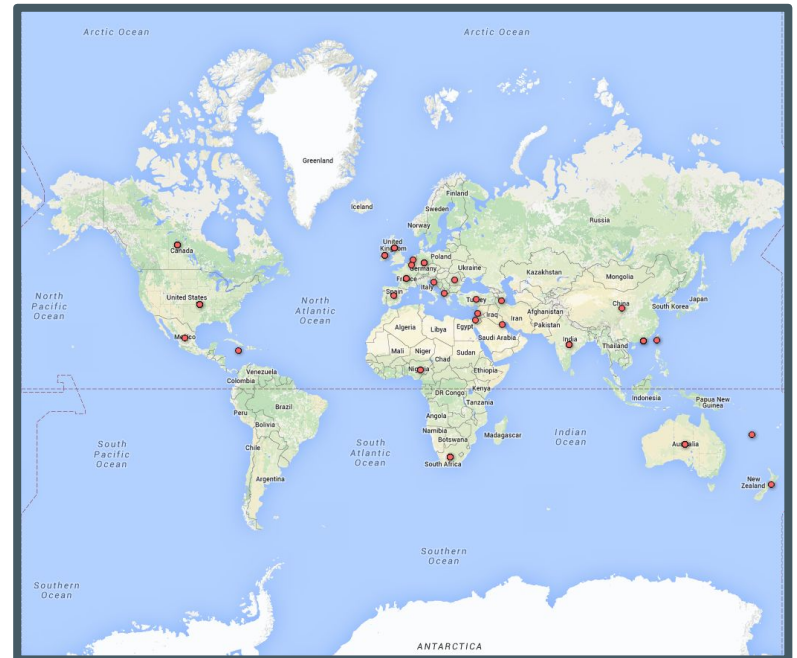
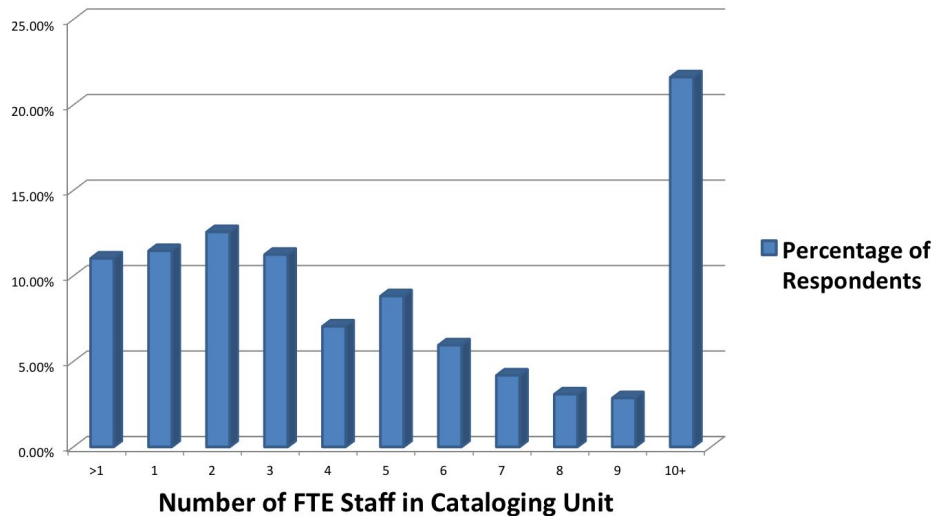
Faculty/Non-Faculty Status of Professional Catalogers



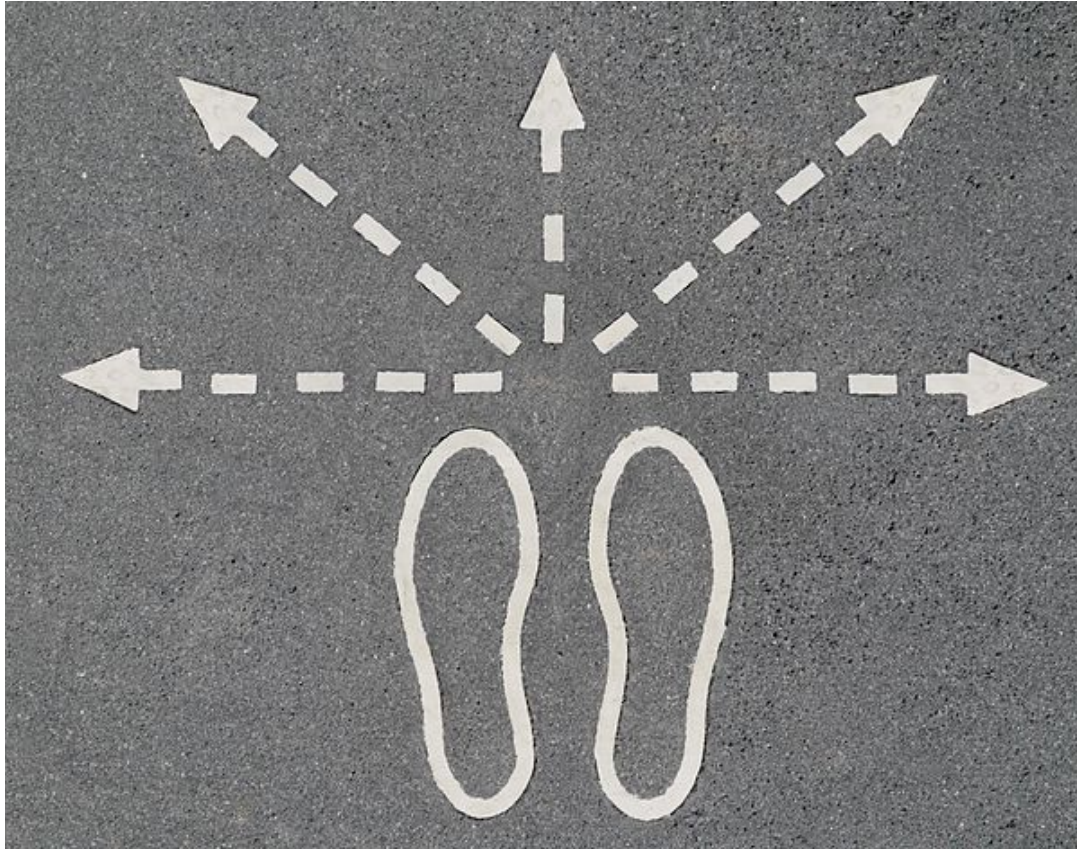
What ILS is used for traditional MARC cataloging?



Staffing Levels of Cataloging Units



WHERE NEXT?



- Identify a question
- Develop survey
- Analyze data
- Share results
- Lessons learned

What Did You Find?

SHARE RESULTS

WEBSITE

Organization of Cataloging Units in Academic Libraries

HOME / ABOUT / DATA ANALYSIS / CONTACT



Welcome!

This website is dedicated to the study of organizational structures for cataloging units in academic libraries. It was developed in 2016 and is maintained by Jeremy Myntti, Head of Digital Library Services at the University of Utah and Liz Woolcott, Head of Cataloging and Metadata Services at Utah State University, as part of the output stemming from a survey that analyzed the Organization and Structure of Cataloging Units in Academic Libraries. The survey is

Baccalaureate Institution Staffing by Student FTE

Average Staffing Levels in Baccalaureate Institution Cataloging Units

Staff Levels



↑ Respondents answered questions regarding the type of institution and the cataloging unit staffing levels at the professional, para-professional and hourly level. * This is the average staffing reported for the 55 respondents from baccalaureate institutions.

Overall staffing**

Masters Institution Staffing by Student FTE

Average Staffing Levels in Masters Institution Cataloging Units

Staff Levels



↑ Respondents answered questions regarding the type of institution and the cataloging unit staffing levels at the professional, para-professional and hourly level. * This is the average staffing reported for the 99 respondents from masters institutions.

<https://catalogingunitorg.wordpress.com/>

SOCIAL MEDIA



Liz Woolcott shared a link to the group: [Troublesome Catalogers and Magical Metadata Fairies](#).

May 25, 2016 · Logan, UT · 🌐

Thanks to everyone that took the Organization of Cataloging Units survey last month. [Jeremy](#) and I promised to report back on what we found. There is a lot of data to go through, so we put together this website. So far, we have done some statistical analyses of what cataloging units are calling themselves, staff titles (professional, para-professional, and hourly), and what staffing levels were reported. But we are still at the beginning stage of the analyses.

We'll be posting regular updates on the data as we work through everything. We were hoping to start a conversation on this topic, as well. We'd love to invite contributors to the blog and feature [Troublesome/Magical](#) folks and/or your thoughts on the how the function of cataloging units are affected by their structure. Just let us know if you would be interested!

Organization of Cataloging Units in Academic Libraries

This website is dedicated to the study of organizational structures for cataloging units in academic libraries. It was developed in 2016 and is maintained by Jeremy Myntti, Head of Digital Library Services at the...

CATALOGINGUNITORG.WORDPRESS.COM

👍 You, Anna Neatrou, Heather Pretty and 26 others



Like



Comment



Share



Liz Woolcott @LizWoolcott · 17 Jun 2016

Are [#catalogingunits](#) helping to provide metadata for Digital Libraries and IRs?

Answer: Yes, No, Maybe so. [@jmyntti](#)



Catalogers Integrated in the Digital Library?

Is your cataloging unit involved in the creation of metadata for the Digital Library and/or Institutional Repository? For the 82 respondents that selected "Sor..."

catalogingunitorg.wordpress.com



2



1

PRESENTATIONS

Organization and Structure of Cataloging Units in Academic Libraries Research Project

American Library Association Midwinter Meeting
Heads of Cataloging Interest Group
January 23, 2017



Liz Woolcott
Head of Cataloging and Metadata Services



Jeremy Myntti
Head of Digital Library Services

CHOOSE YOUR OWN RESEARCH ADVENTURE:
DEVELOPING A TECHNICAL SERVICES BASED RESEARCH PROJECT

Utah Library Association
Annual Conference
May 18, 2017

Liz Woolcott
Head of Cataloging and Metadata Services
liz.woolcott@usu.edu @lizwoolcott

Jeremy Myntti
Head of Digital Library Services
jeremy.myntti@utah.edu @jmyntti

Roles and Responsibilities of Cataloging Units in Academic Libraries Research Project

...

American Library Association Annual Conference
Cataloging & Classification Research Interest Group
June 26, 2016



Liz Woolcott
Head of Cataloging and Metadata Services



Jeremy Myntti
Head of Digital Library Services



Now, What Do You Want Me to Do?

New and Emerging Roles for Cataloging and Metadata Librarians

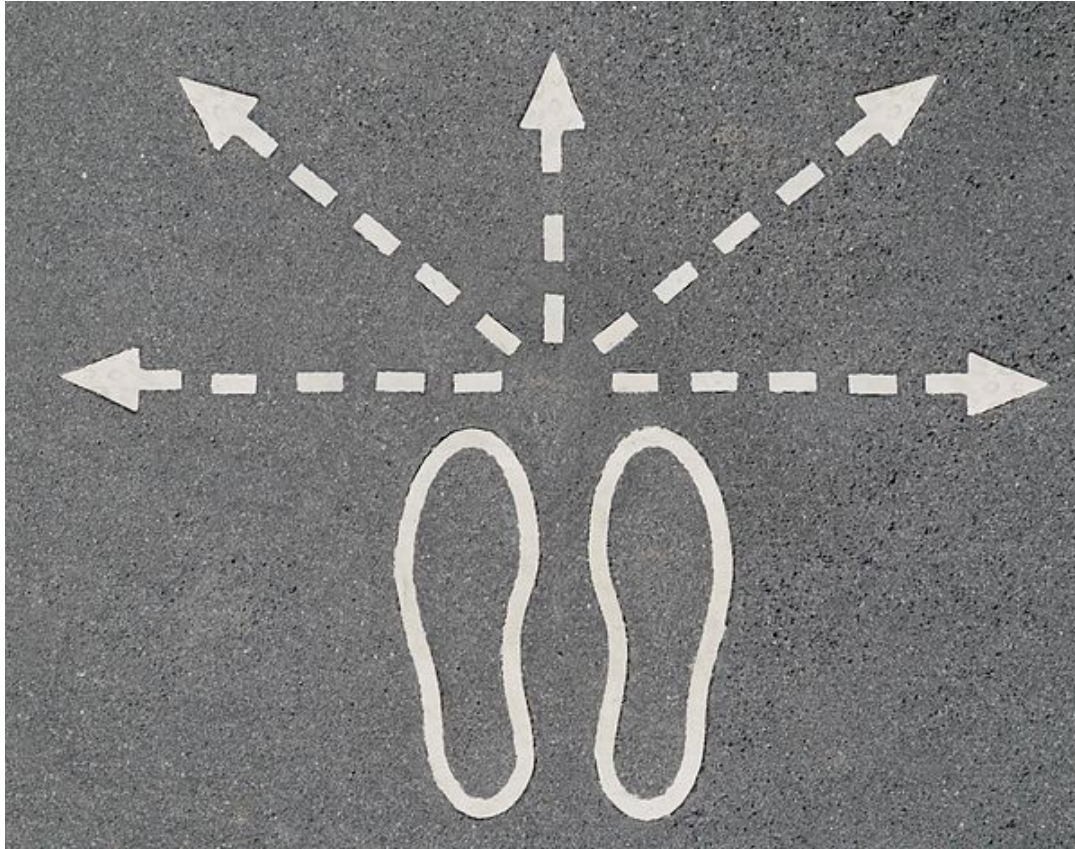


Liz Woolcott
Head of Cataloging and Metadata Services
@lizwoolcott



Jeremy Myntti
Head of Digital Library Services
@jmyntti

WHERE NEXT?



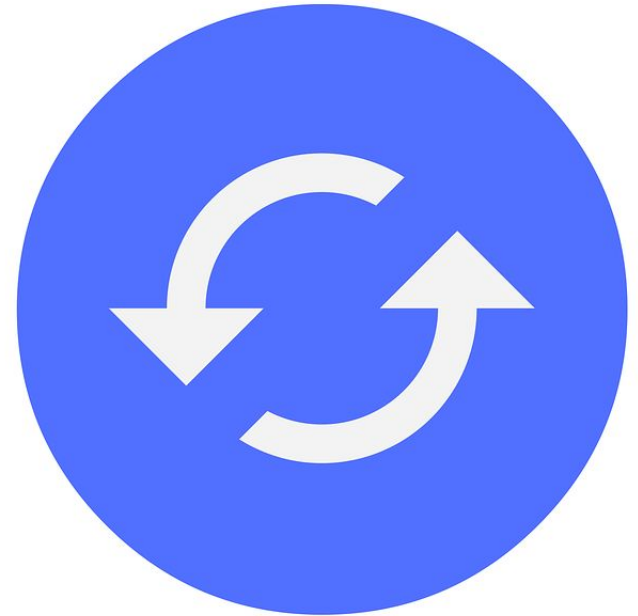
- Identify a question
- Develop survey
- Analyze data
- Share results
- Lessons learned

What Did You Find?

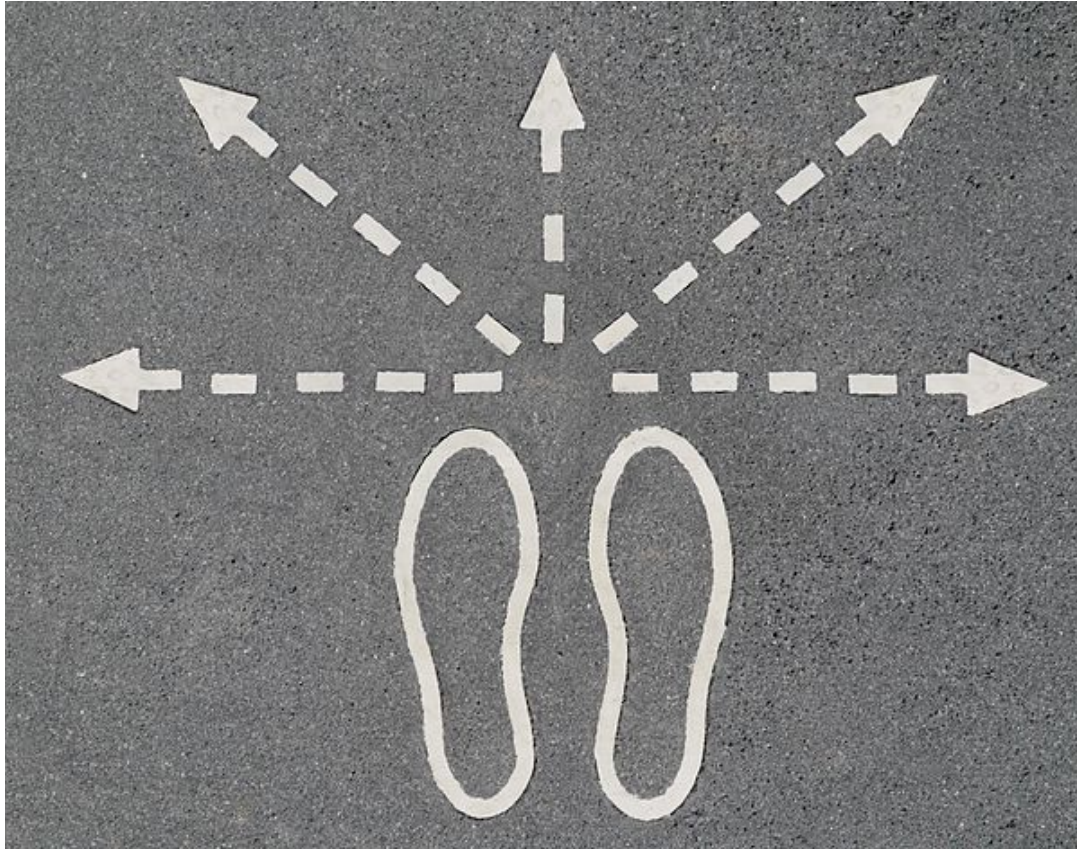
LESSONS LEARNED

LESSONS LEARNED

- Test and retest survey before sending out
- No need for extended open period
- Clarify who should answer survey
- Think about how you analyze questions before you include them
- Use open ended questions sparingly
- Limit questions



WHERE NEXT?



- Identify a question
- Develop survey
- Analyze data
- Share results
- Lessons learned

What Did You Find?

WHAT DID YOU

FIND?

WHERE SHOULD WE START?

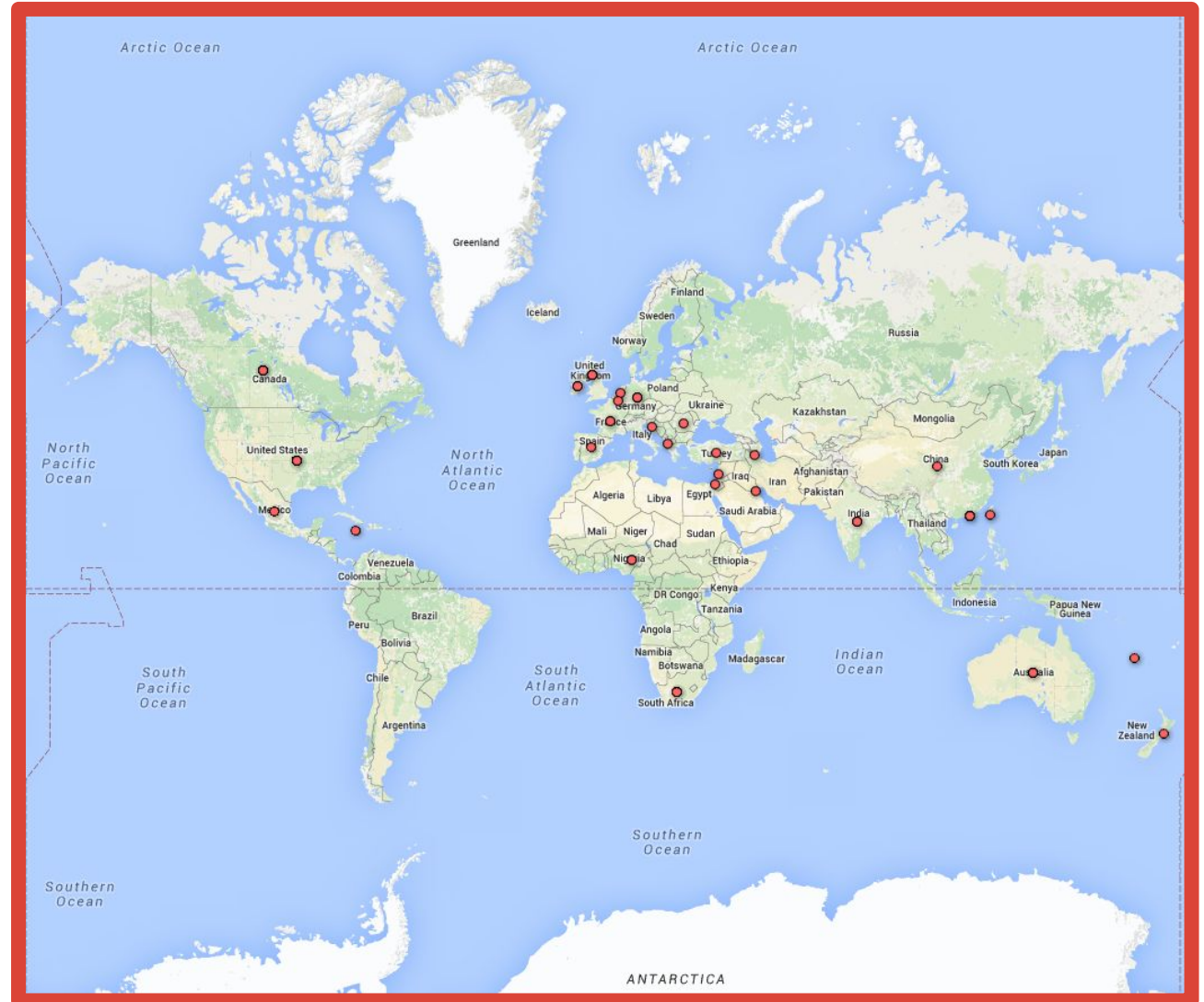
- Types of responses
- Tools used
- Tasks completed
- Titles of units and people
- Structures of units
- Future plans



Questions?

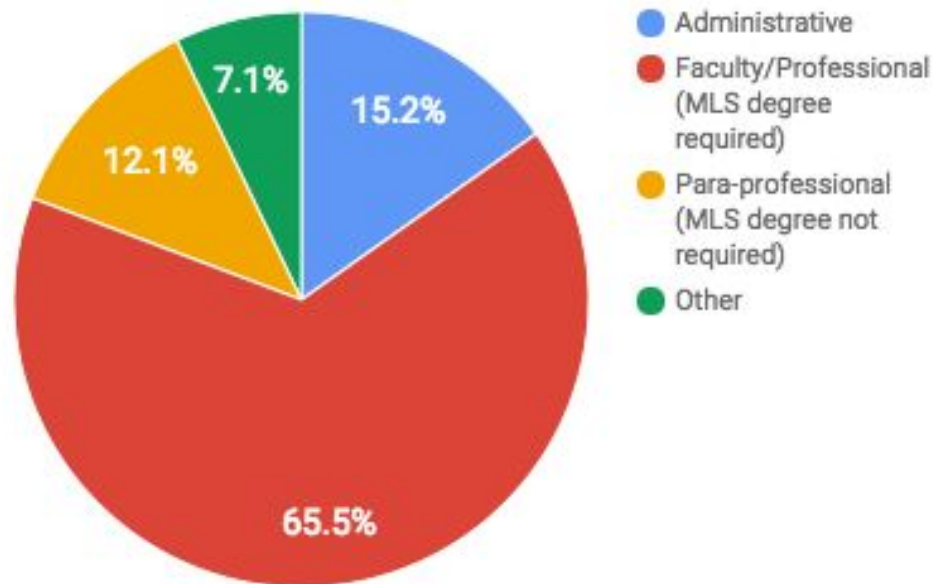
TYPES

SURVEY RESPONSE RATE

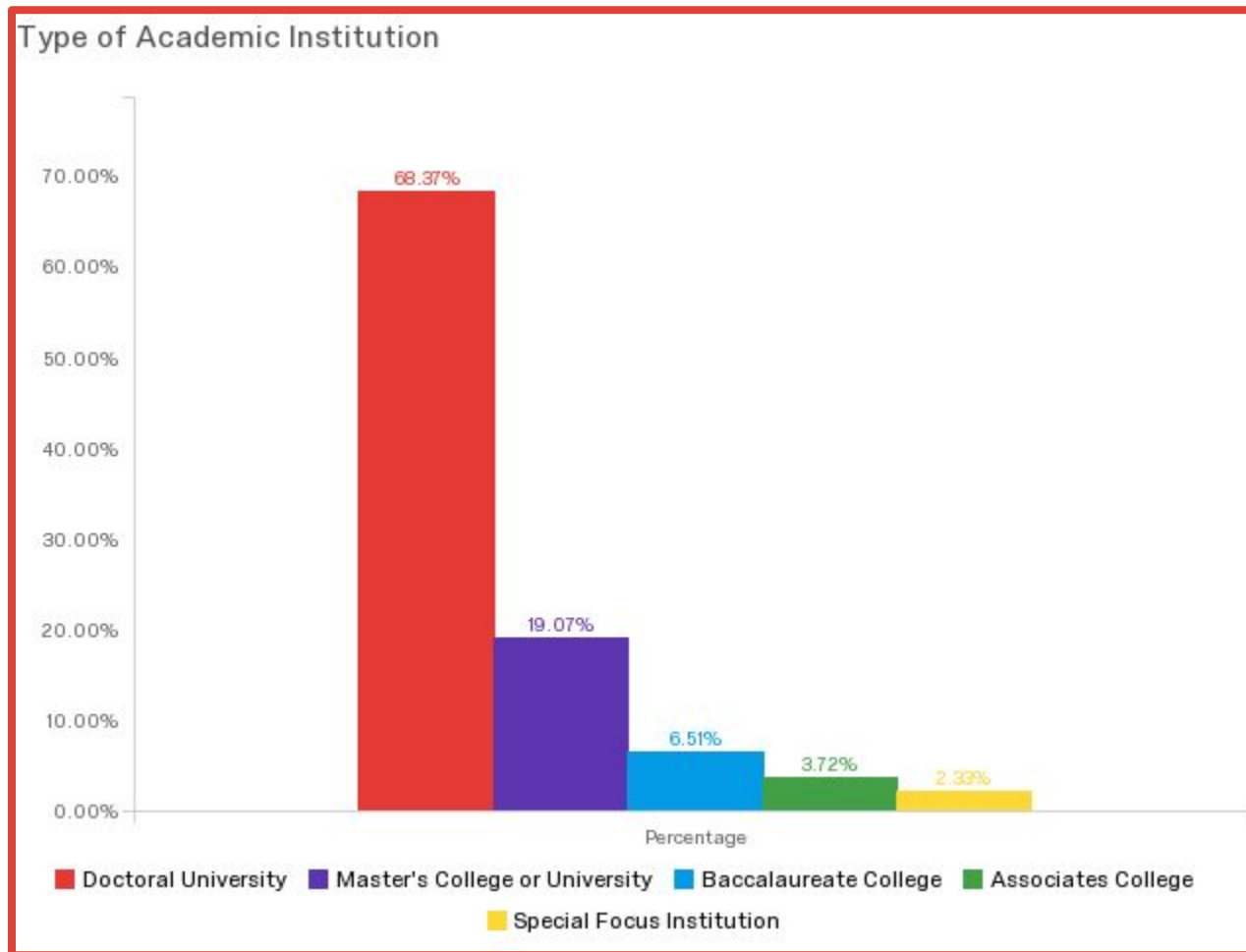


RESPONDENT DEMOGRAPHICS

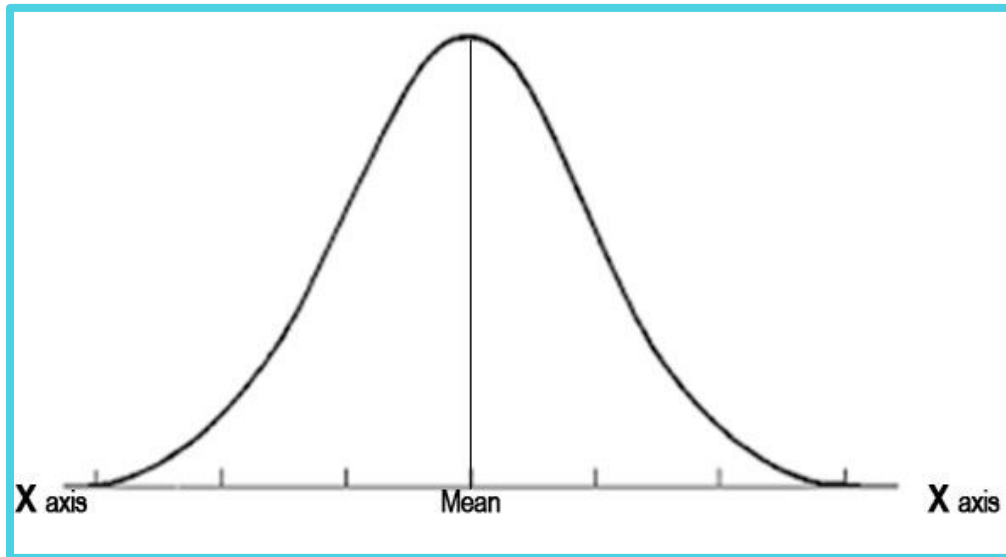
Role of Survey Respondent



TYPE OF ACADEMIC INSTITUTION

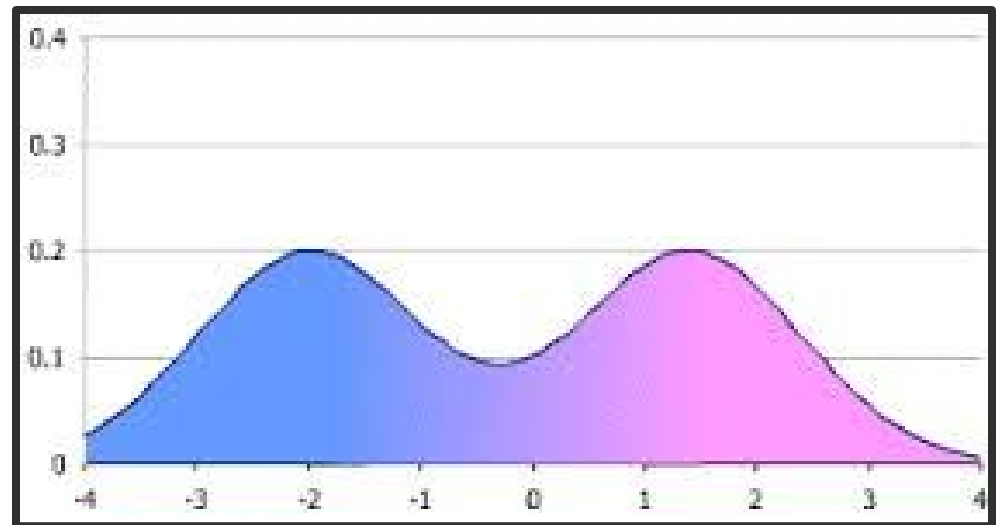


UNEXPECTED OUTCOMES



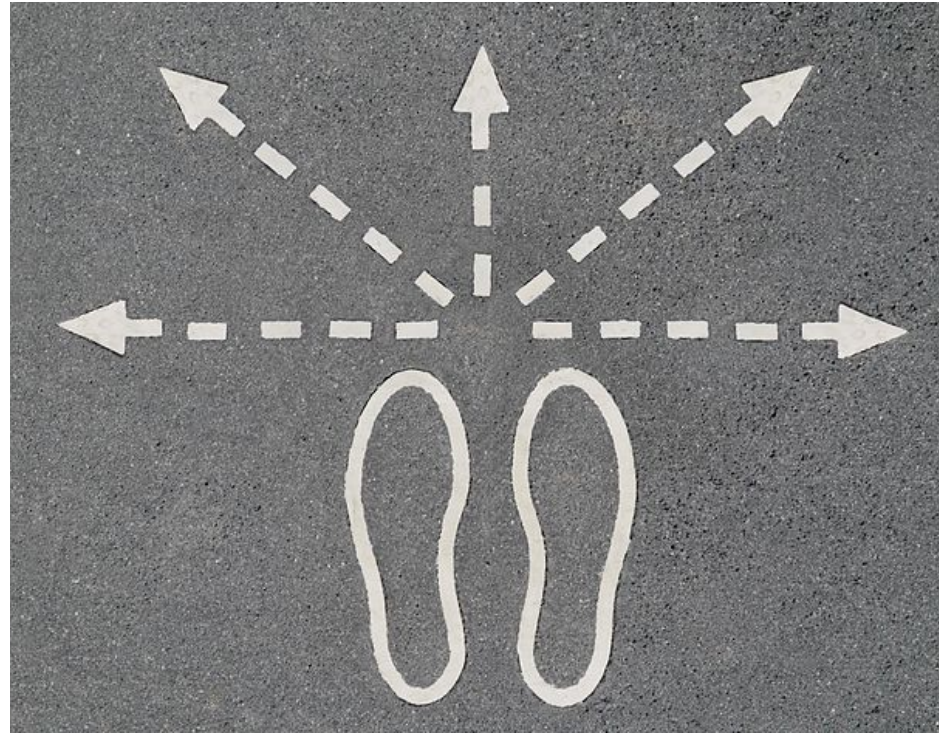
Fewer normal distributions

More bimodal distributions



WHERE NEXT?

- Types of responses
- Tools used
- Tasks completed
- Titles of units and people
- Structures of units
- Future plans

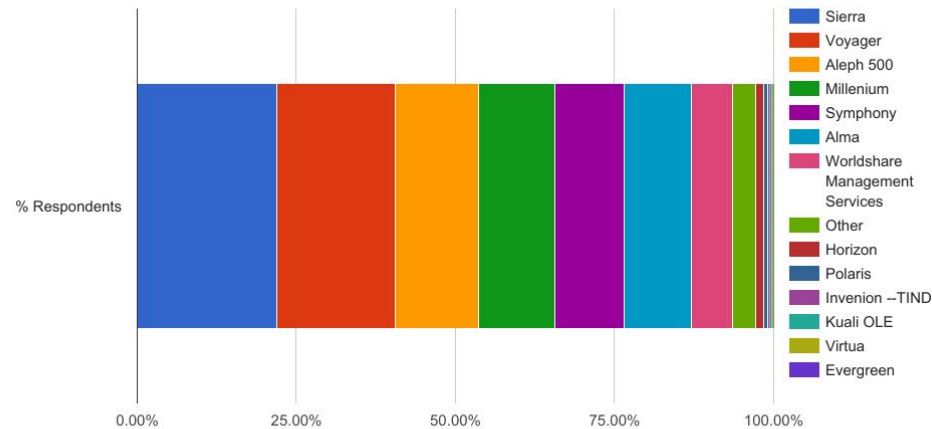


Questions?

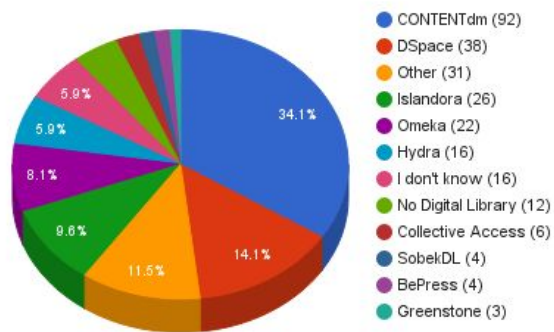
TOOLS

TOOLS

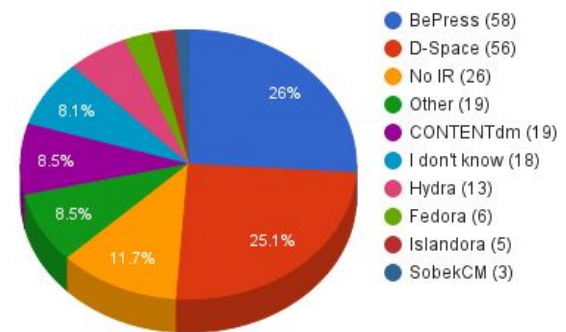
What ILS is used for traditional MARC cataloging?



Digital Asset Management System

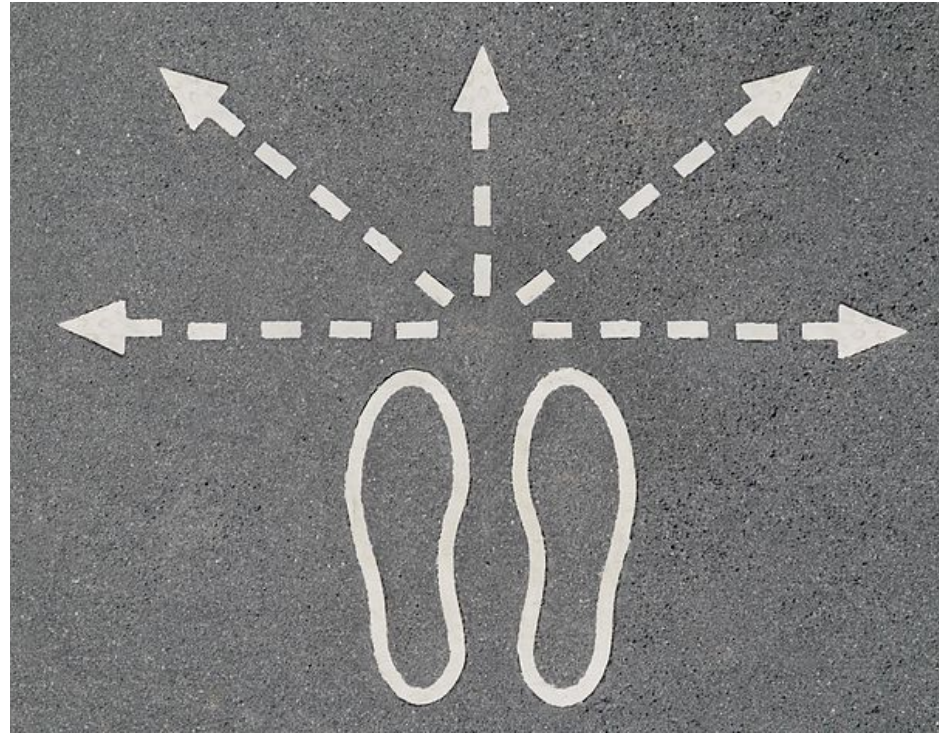


Institutional Repository System



WHERE NEXT?

- Types of responses
- Tools used
- Tasks completed
- Titles of units and people
- Structures of units
- Future plans



Questions?

TASKS

TASKS COMPLETED

Overall Responsibility for Cataloging and Metadata Creation

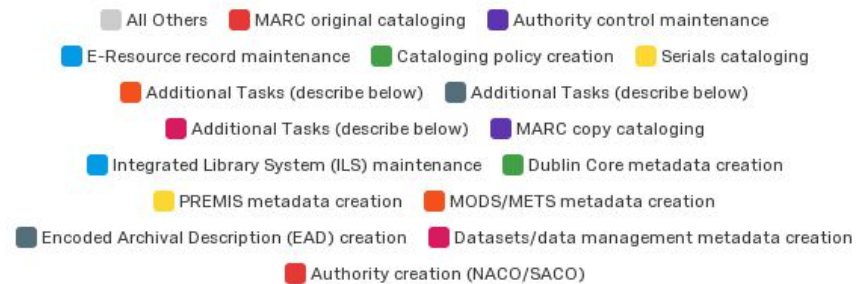
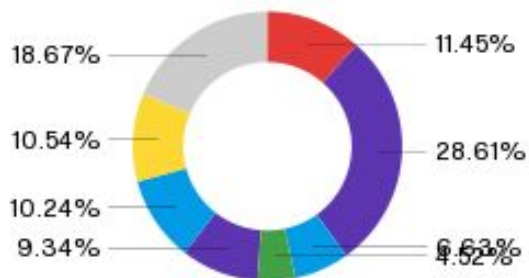
IN CATALOGING Professional



IN CATALOGING Para-professional

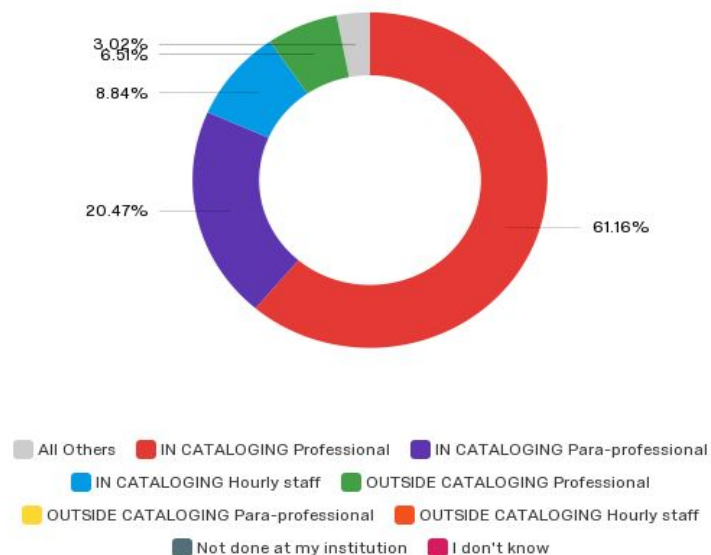


IN CATALOGING Hourly staff



INDIVIDUAL TASKS

Responsibility for MARC Original Cataloging

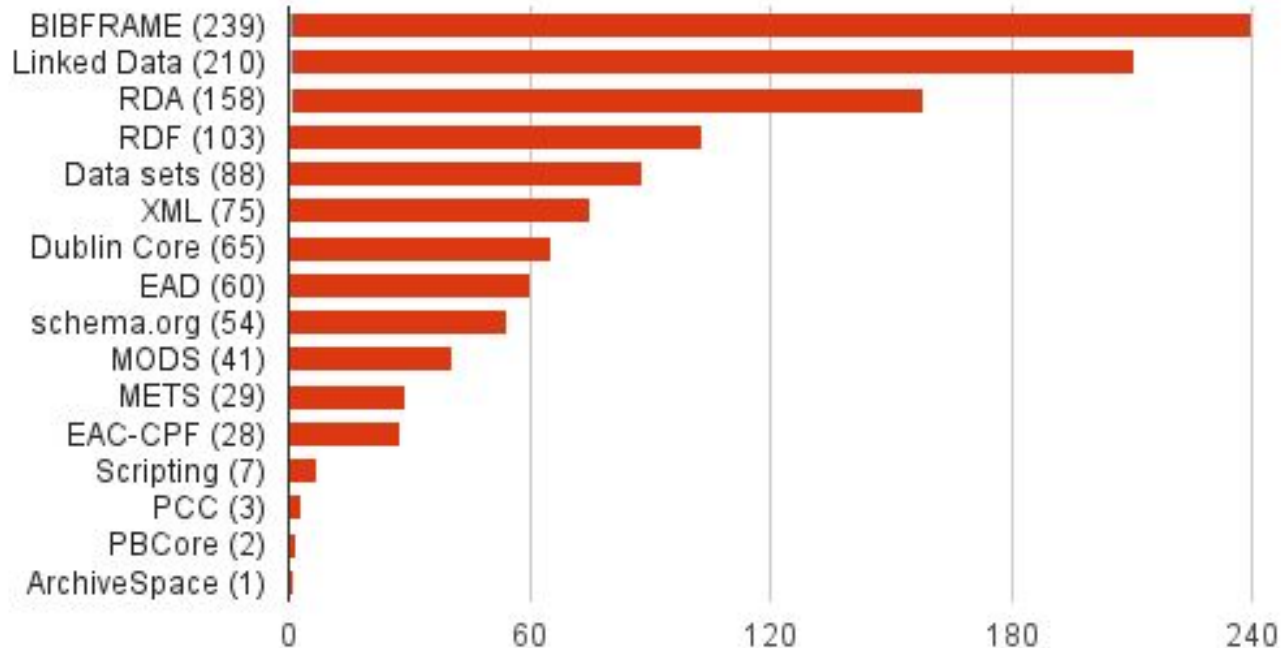


MARC original cataloging

	Doctoral University	Master's College or University	Baccalaureate College	Associates College	Special Focus Institution	Total
IN CATALOGING Professional	139	66	34	13	8	260
IN CATALOGING Para-professional	66	14	3	4	0	87
IN CATALOGING Hourly staff	21	7	9	0	0	37
OUTSIDE CATALOGING Professional	21	4	2	0	1	28
OUTSIDE CATALOGING Para-professional	4	0	1	0	0	5
OUTSIDE CATALOGING Hourly staff	5	0	0	0	0	5
Not done at my institution	3	0	0	0	0	3
I don't know	0	0	0	0	0	0
Total	150	74	43	15	9	291

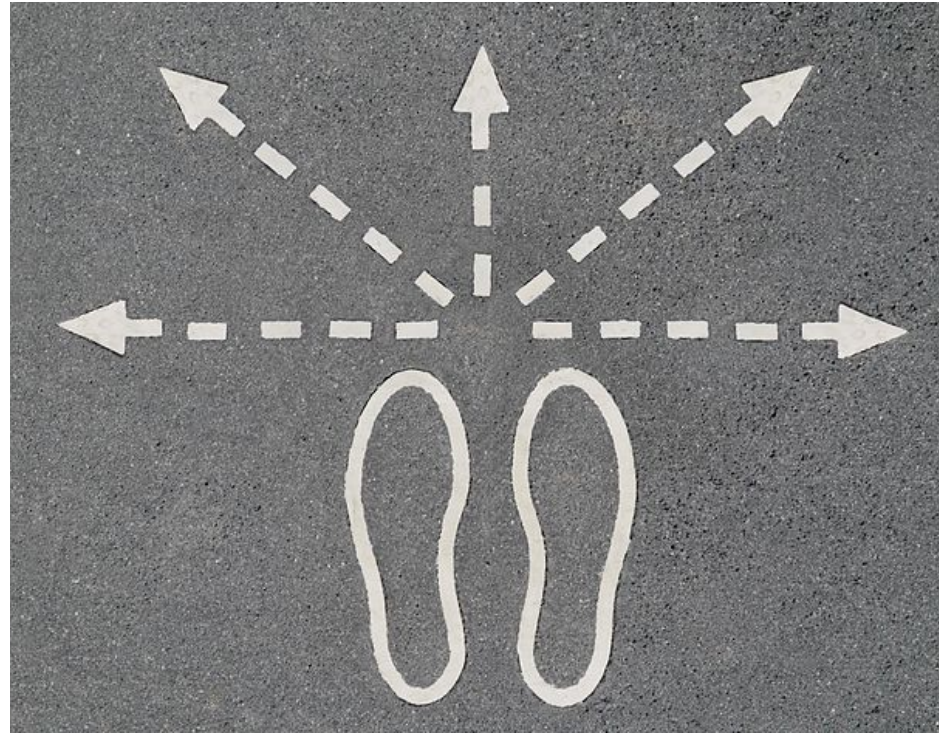
FUTURE SKILLS FOR CATALOGERS

New Skills for Catalogers to Learn



WHERE NEXT?

- Types of responses
- Tools used
- Tasks completed
- Titles of units and people
- Structures of units
- Future plans



Questions?

TITLES

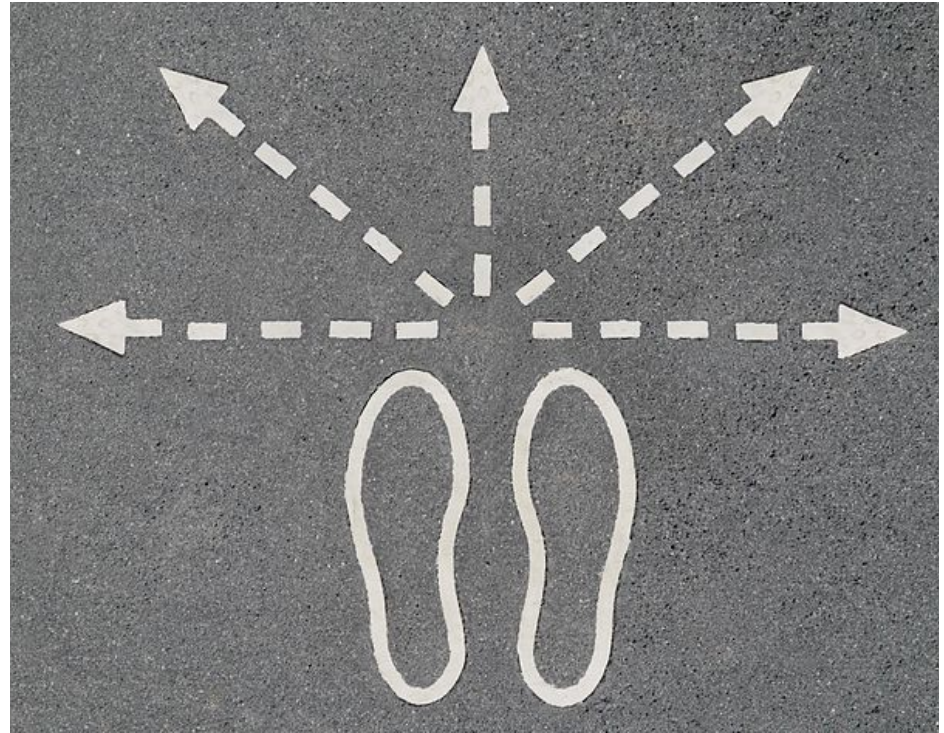
Technical Services	79
Cataloging	76
Cataloging and Metadata Services	14
Metadata Services	12
Cataloging and Metadata	8
Metadata	7

[illegible]

Catalog/Cataloging Librarian	54
Metadata Librarian	29
Head of Cataloging and Metadata Services	9
Head of Cataloging	8
Head of Technical Services	8
Electronic Resources Librarian	7
Technical Services Librarian	7
Cataloger	6
Cataloging and Metadata Librarian	6
Systems Librarian	6

WHERE NEXT?

- Types of responses
- Tools used
- Tasks completed
- Titles of units and people
- Structures of units
- Future plans

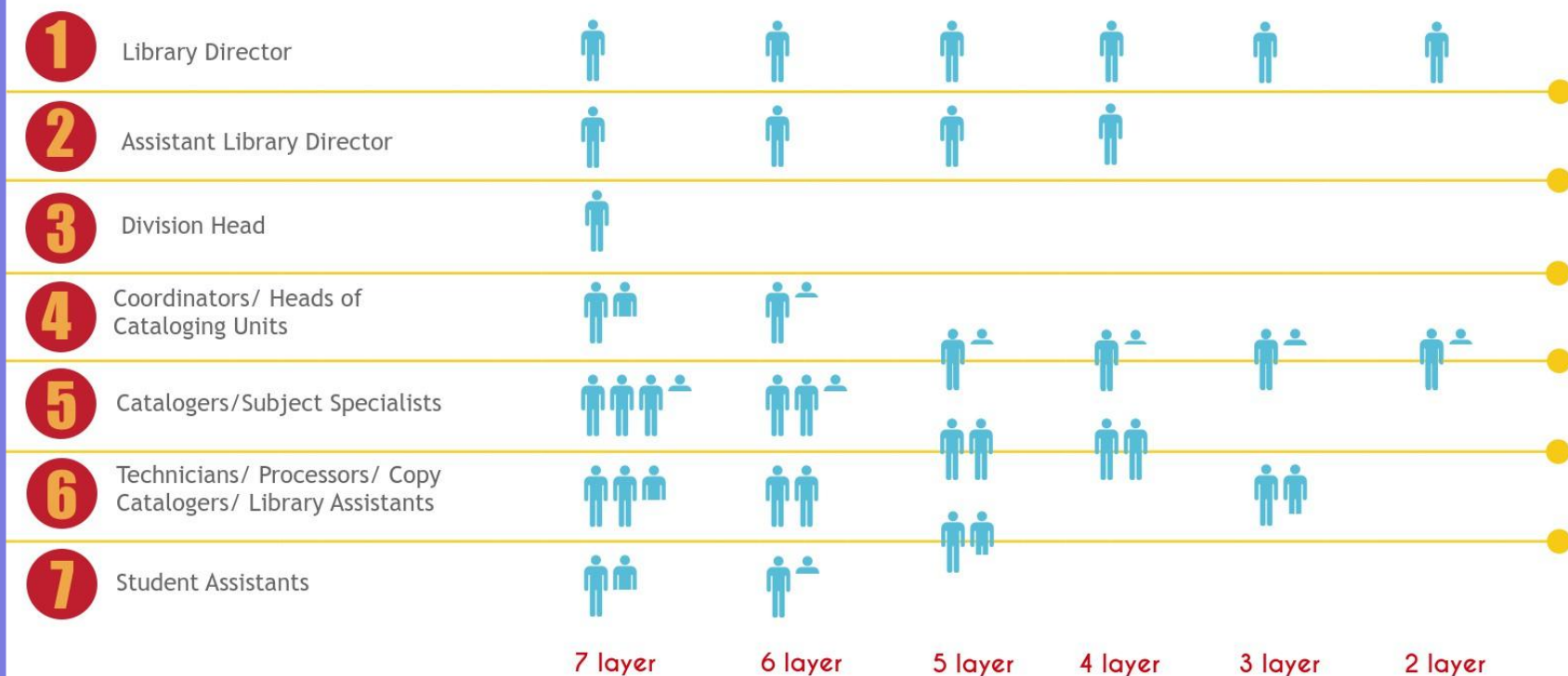


Questions?

STRUCTURES

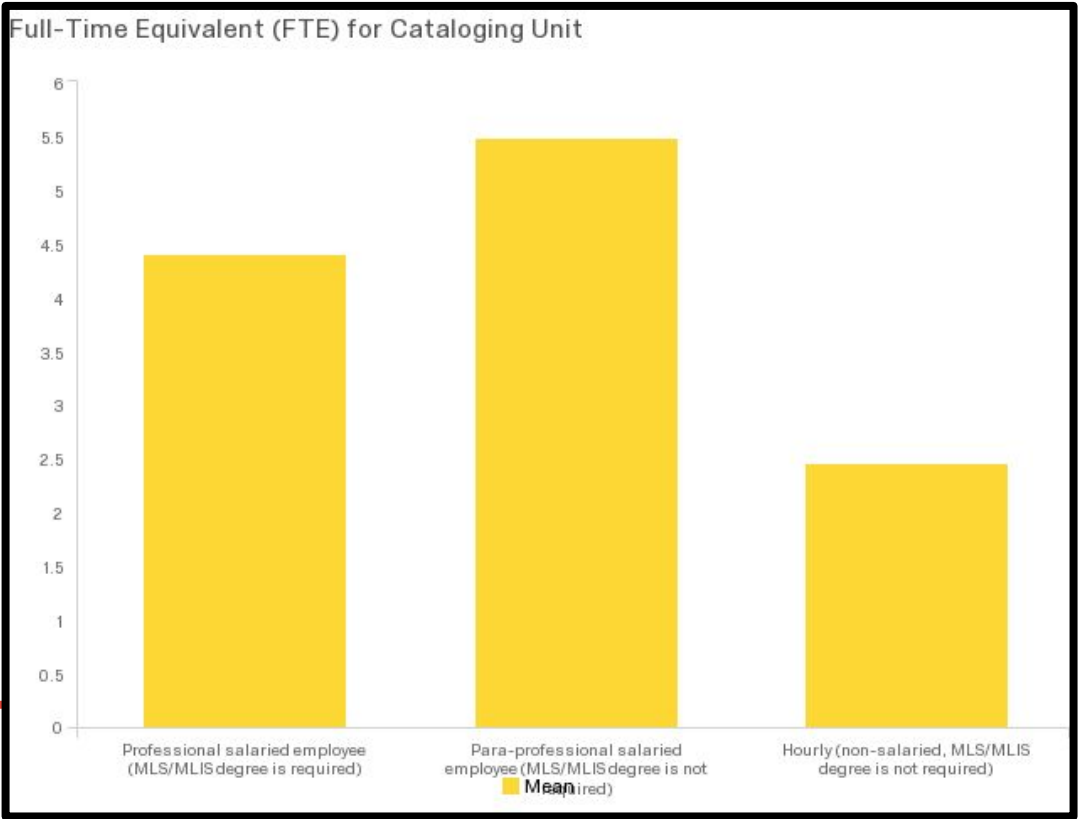
CURRENT STRUCTURES

Variations in Reporting Structures and Staffing *for* Cataloging Units *in* DOCTORAL INSTITUTIONS



Data taken from the "Survey on the Organization and Structure of Cataloging Units in Academic Libraries" conducted by Jeremy Myntti and Liz Woolcott in spring 2016.

FTE CATALOGING DEPARTMENT



Full-Time Equivalent (FTE) for Cataloging Unit

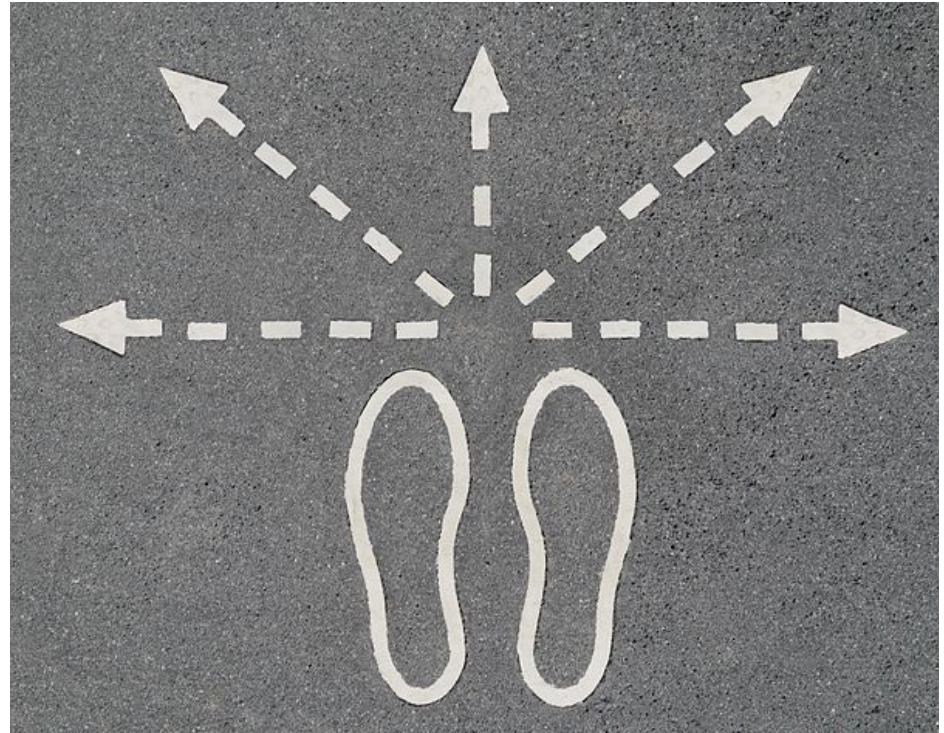
Field	Mean	Count
Professional salaried employee (MLS/MLIS degree is required)	4.40	216
Para-professional salaried employee (MLS/MLIS degree is not required)	5.48	213
Hourly (non-salaried, MLS/MLIS degree is not required)	2.46	216

BROAD TRENDS

- Structures and organizational hierarchies are in flux
- Three main shifts:
 - Grouping all tech services into single reporting unit
 - Splitting cataloging units into other library units, usually:
 - Electronic resources
 - Acquisitions
 - Collection Development
 - Special Collections/Archives
 - Digital Initiatives
 - Developing team models based on skill sets
- Shifting structures result of increased demand for e-resources and digital collections
- Cataloging staffing shifts = Loss of positions outright or refocus of staff
- Increasing emphasis placed on non-faculty employees
- Heavy reliance on outsourcing

WHERE NEXT?

- Types of responses
- Tools used
- Tasks completed
- Titles of units and people
- Structures of units
- Future plans



Questions?

FUTURE PLANS

FUTURE PLANS

Reporting live from the field: University of Virginia



Guest blog post by
Ivey Glendon
Manager, Metadata
University of Virginia

When Liz and Jeren
couldn't wait to see
metadata librarian

several reorganizations. As they note in the [Abstract](#), units in academic libraries have changed and changed priorities, shifting responsibilities, and changes in my institution and my goal here is to provide a pair with their data.

I am no stranger to a changing organizational structure. I was a librarian into what was then called the Catalog

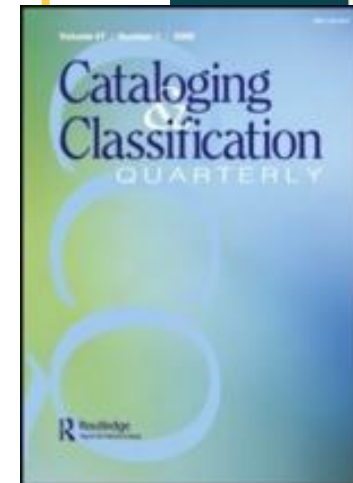
Student Centered Technical Services

Guest post by **Roman S. Panchyshyn**

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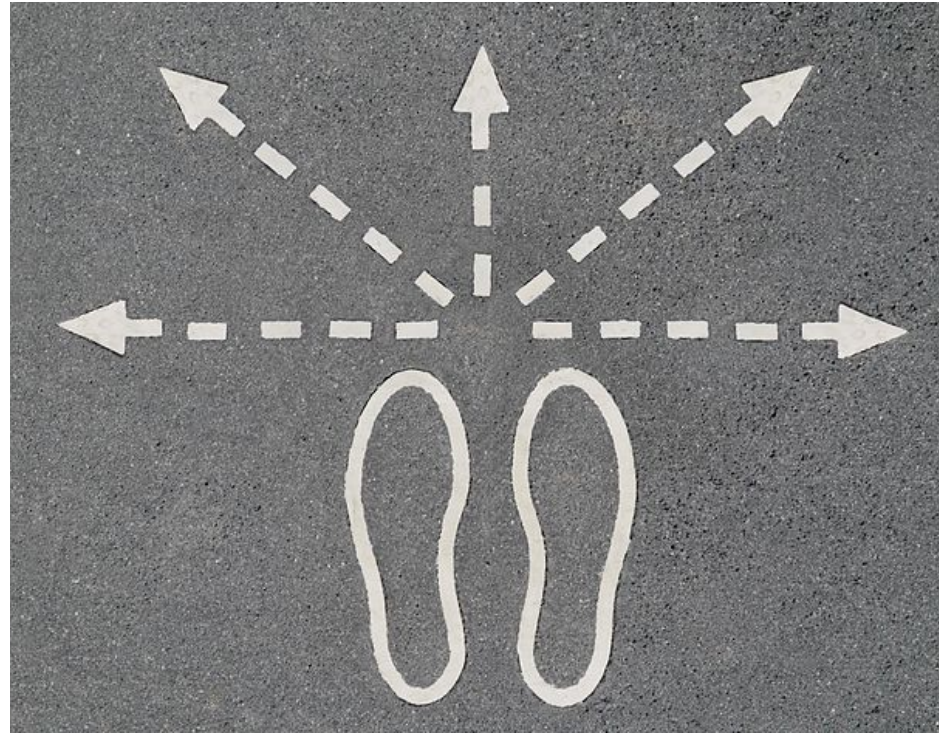
An extensive body of literature is available on the topic of student employment and training in academic libraries. Some of this literature focuses directly on training students in technical services, and places a strong emphasis on training students for copy cataloging work. Many libraries have already used students very successfully to assist with cataloging workflows, and have taken advantage of students' knowledge of foreign languages.

When projecting the evolution of technical services, I feel that economic and budgetary pressures will drive the emergence of what I refer to as the "student centered technical services" model. The traditional technical services functions, those taught to LIS schools graduates, include acquisitions, cataloging, serials control, electronic resource management, database maintenance, and bindery/labelling/repair. Many academic libraries already have students assisting with some of these processes, but much of the work is handled by full-time staff (professional and/or paraprofessional). However, with proper training and management,



WHERE NEXT?

- Types of responses
- Tools used
- Tasks completed
- Titles of units and people
- Structures of units
- Future plans



Questions?

QUESTIONS?

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